Position Training (XP02/ZP02)

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Using this Training Manual

When you attend HRIS Training, this manual will be used to outline the process. In the class you will learn specifics on how to process an individual action.

After training, additional resources can be found on the HRIS Website, including a link to Self Directed Help. This section of the training manual will provide an outline of the naming conventions and setup/flow of the training material.

Text Conventions

The manual is setup using standard text conventions and distinct visual elements to make training easier to follow.

Format	Meaning
Bold	Name of a Form/Field. A manual title. An emphasized word/phrase. A placeholder for a user-defined value.
Italics	A key name. For example, Shift and Enter are key names.

Visual Elements

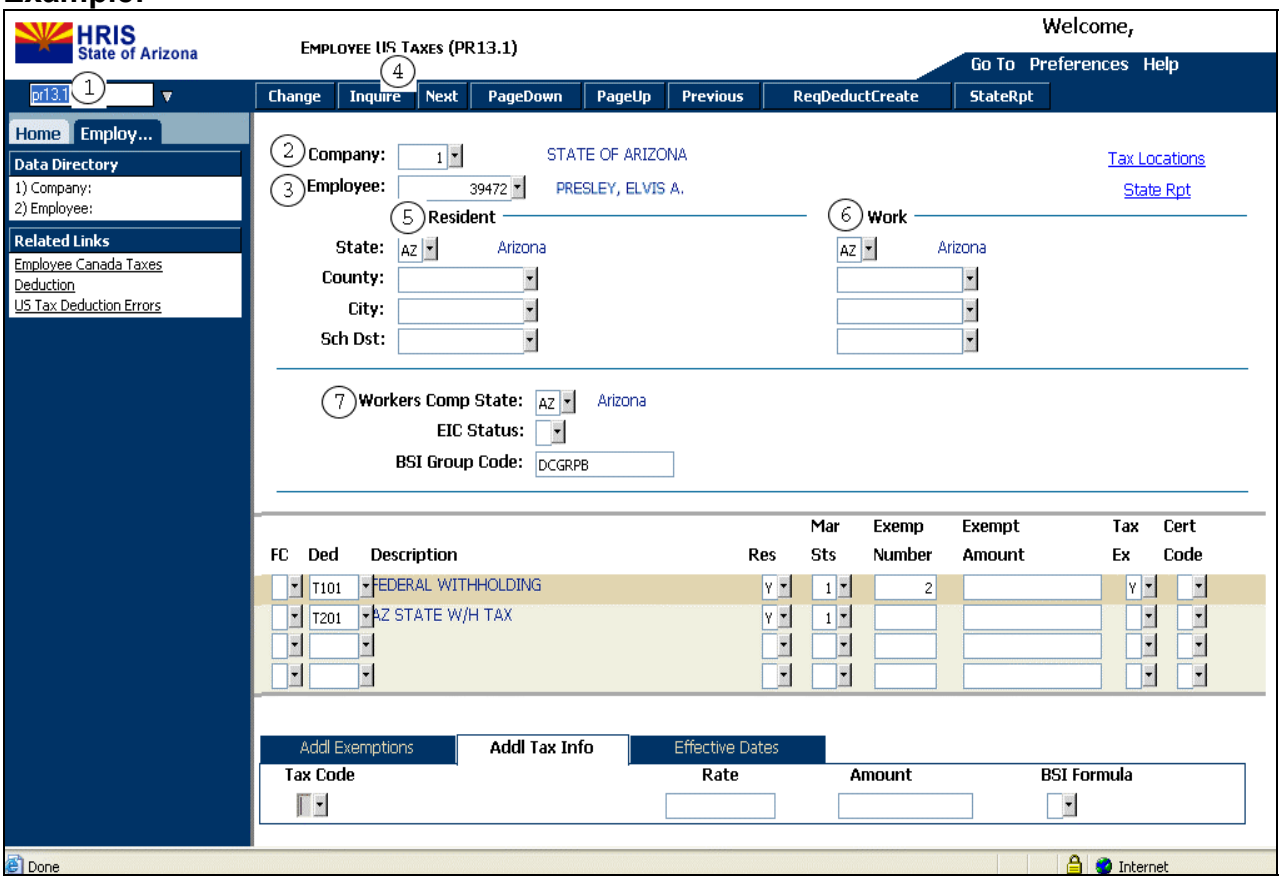
Visual elements are provided for certain types of information to draw your attention to that element/concept.

Format	Meaning
	Tip – provides miscellaneous information about facts that might be of interest to you as you complete the process.
	Warning or Important Note – provides critical points or items that you must address as you complete the process.
	Exercise – indicates Exercise

Screen Captures

Screen Captures are provided prior to each Task Step Chart. The capture will identify the Form Name and Form Number according to the task. The numbers identified on the screen capture correspond to the numbered tasks in the chart.

Example:



Task Step Chart

The Task Step Charts are set up to easily identify each necessary step taken with follow through explanation to make training easier to follow.

Format	Meaning
Number Column	This number identifies, on the screen capture, the order the steps are to be taken (in sequence)
HRIS FIELD	This identifies the field on the form that your action is required.
R/O	This will tell you if the field you are working on is a **R**equired field or an **O**ptional field.
Step/Action	This will identify what needs to be entered in the current field.
Expected Result	This will identify the result of your current action taken. If the task step chart is blank, make sure to always check the lower left hand corner of your screen for messages from HRIS.
Notes/Additional Information	This will identify Warning or Important Note – provides critical points or items that you must address as you complete the process.

HRIS Basics

HRIS has a number of standard features that work the same regardless of the field you are on in the system.

HRIS Forms

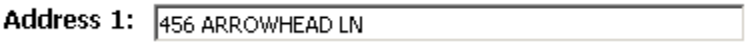
- HRIS Forms will always open with the fields blank.
- When navigating in HRIS, you can move from field to field by pressing the Tab button on your keyboard, or clicking your mouse in each new field.
- You must then type or select from a drop down menu the items you want to fill into your fields. If you transfer from another HRIS form, some of the data from the previous form (ex. Company and Employee EIN) will fill in those same data items on the new form.

Comparing Fields on HRIS Forms

There are key fields, which are required on HRIS Forms.

- All information should be entered in CAPITAL LETTERS.

- Do not use punctuation.
-



- Phone numbers are input with periods. (602.111.1111)
- Information is Added/Changed/Inquired on using the navigation bar. You can also use the buttons Next/Previous to move between Employee records.

HRIS System Messages

- Always check the bottom left corner of a form for system messages such as "Add Complete-Continue."
- HRIS has built in edits to validate information. For example:
  - The Social Security Number is checked by HRIS to see that it is in the correct format and it does not already exist.

Introduction

The HRIS Position Training Manual is divided into two major sections: Position Code Basics and Position Training.

The Position Code Basics section will outline how position codes are setup in the HRIS system and a description of the hierarchy for defaulting in HRIS. This section will also outline some critical points regarding the assignment and allocation of positions.

The Position Training section will explain how to use the two forms in HRIS related to the setup and maintenance of State of Arizona Positions. The Non System-A Class & Compensation Analyst and ADOA Central Class & Compensation Administrator use the Position Form (XP02.1) to create, update and inactivate Position Codes. The Agency HR Initiators use the Agency Position Maintenance Form (ZP02) to update selected fields on the Position including: Supervisor Code, Supervisor Link, check locator, security, accounting, and location information.

Agencies should review the entire training manual, although they may/may not have access to all of the forms outlined.

If agencies would like additional information on the mapping of HRIS expense accounts to AFIS, they should refer to the HRIS Job Aid – Labor Distribution Crosswalk to AFIS.

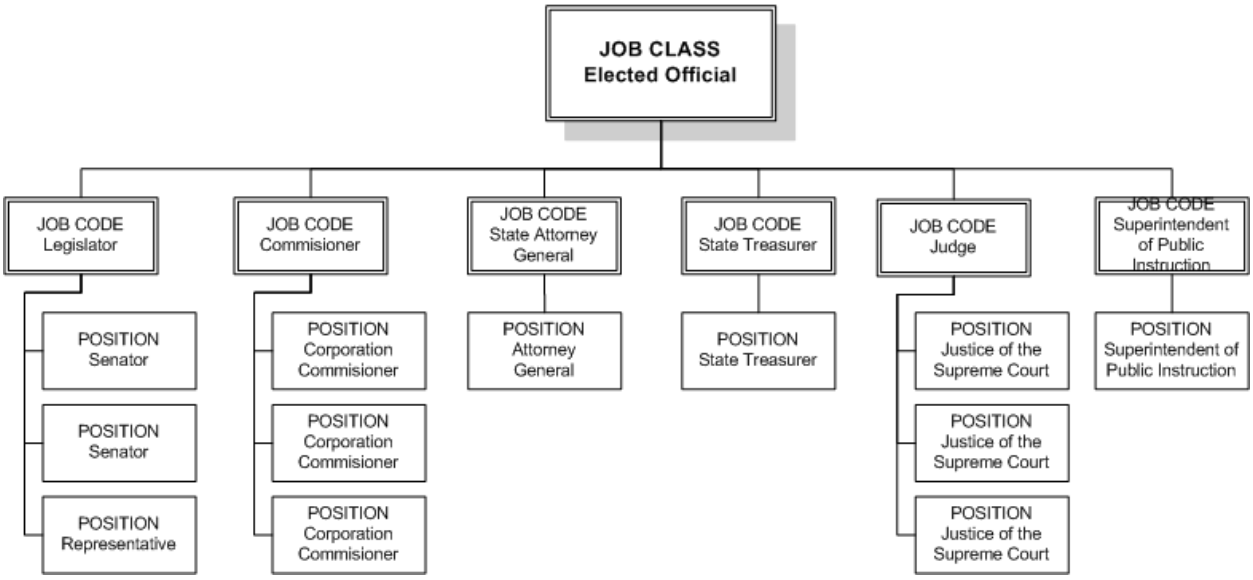
For additional information on the setup of HRIS expense accounts, please refer to the HRIS Labor Distribution Presentation.

Position Code Basics

Position Codes and Descriptions are an integral part of the process that identifies the work employees perform at the State. Positions are specific to each employee, and more precisely define the type and level of work, than do Job Codes or Job Classes.

Job Classes are broad categories of types of work and often have no distinction from the lowest graded job to a management level job. **Job Codes** are generic work functions at the same level of authority, responsibility and accountability. Many different types of Job Codes may fit into one Job Class. Similarly, there may be many **Positions** allocated to one Job Code. Each employee is assigned to a unique position code.

Sample Position/Job Code/Job Class Hierarchy



Each Position Code is smart-coded. Every Position Code

- Is comprised of twelve (12) alphanumeric characters, and each letter or number represents something. For a graphic picture of the Position Code setup, refer to the HRIS Job Aid – Position Code Structure.
- Designates the Personnel System and Agency in which the Position is found.
- Shows if the Position is eligible for overtime and, if so, if the rate is straight time or time and one-half (letter E or N, respectively).
- Indicates whether the Position is covered by the Merit System or not.
- Shows if the Position is an Underfill or a Multi-fill Position.

The Description attached to a Position Code should be the Working Title or Functional Title of the Position. The Description

- Is ideal for Job Codes in broadbands. For example, Positions allocated to the Information Technology Specialist 3 may be Applications Programmers, Software Specialists or Computer Operations Managers.
- May identify field of specialization (Database Administrator v. Software Programmer; Payroll Clerk v. Accounts Payable Clerk)
- May identify physical location (Phoenix v. Yuma; Central Office v. Satellite Facility
- May reflect field of work, such as Accounting, Human Resources.

Assignment/Allocation of Positions

- Using Form XP02.1, Positions are created, reclassified or inactivated only by these Job Roles:
    - ADOA Central Class & Compensation Administrator
    - Agency Non-System A Class & Compensation Analyst.
- System A agencies may utilize the ZP02.1 to modify some information on the position, including Location, Labor Distribution, User Level and Security. However, Effective Date, Status, Process Level, Department, Description, Schedule, Grade, EEO Code, Workers' Compensation Class may not be changed on this form.
- Once created, agency Human Resources staffs may move employees in and out of Active Positions as needed via a Personnel Action (XP52.1).
- Positions are always assigned a Full Time Equivalent (FTE) of 1.0. Employees are also assigned an FTE – up to a total of 1.0. Thus, an employee in a Position who works less than full-time would have an FTE of 0.25, 0.50 or 0.75, rather than 1.0.
- Positions are assigned to one Employee at a time.
- When an Employee is assigned to a Position via the XP52.1, you MUST click the FILL DEFAULTS button so that data from the Position will default automatically to the Employee, thus saving many keystrokes and reducing the potential for input errors.
- Positions can never be totally eliminated from HRIS because historical information on the Position, as well as on any Employees who had held that Position, would be purged from the system also. But, when vacant, they can be inactivated permanently so they are not eligible for re-use, or they can be inactivated temporarily.

FINGER POINTING

- If a Position Code in System A is NOT to be used again, the Position
    - Must be Vacant
    - Changed to a Status of Inactive (5)
    - Be assigned an End Date
    - Have a Reason Code of DO NOT USE

Position Training Introduction

Both the ADOA Central Class and Compensation Administrator role and the Non-System A Agency Class and Compensation Analyst role may create, update and inactivate Position Codes in their entirety. They use the ***Position Form (XP02.1)*** to establish a new Position Code, to reallocate a Position Code (e.g., change a Schedule and Grade or Process Level), change the Title, change the funding data, etc.), or to make the Position Code inactive when it should not be used, or when it is no longer in use by the Agency. History can be tracked in HRIS by using a new effective date when changes are made on the ***Position Form (XP02.1)***. Position Codes may be input as future-dated. They are always counted as 1.0 FTE, even if smart coding within one Position Code indicates it is a part-time Position.

Agency HR Initiators/Approvers in System A Agencies may use the ***Agency Position Maintenance Form (ZP02.1)*** to change a portion, but not all, of the Position Code fields. Changes may include the supervisor code, supervisor link, check locator, security, accounting and location information. History on the Position will be overridden when the ***Agency Position Maintenance Form (ZP02.1)*** is used for changes, as the effective date cannot be changed on this form.

Because everything in HRIS is inter-related, Position Codes are impacted by the information stored within Job Codes and Salary Schedules, so changes to these other data sets affect the Position Code and, in turn, the Employee. As an example, all Positions in the same Job Code have the same Grade Range Schedule and Grade. Assume it is AREG, Grade 14, but through a reclassification moves to Grade 15 in the same Schedule. The new Grade will not automatically default to the Position(s) from the Job Code. The new Grade must be entered on the Position itself (as would the Schedule, if it were new, too).

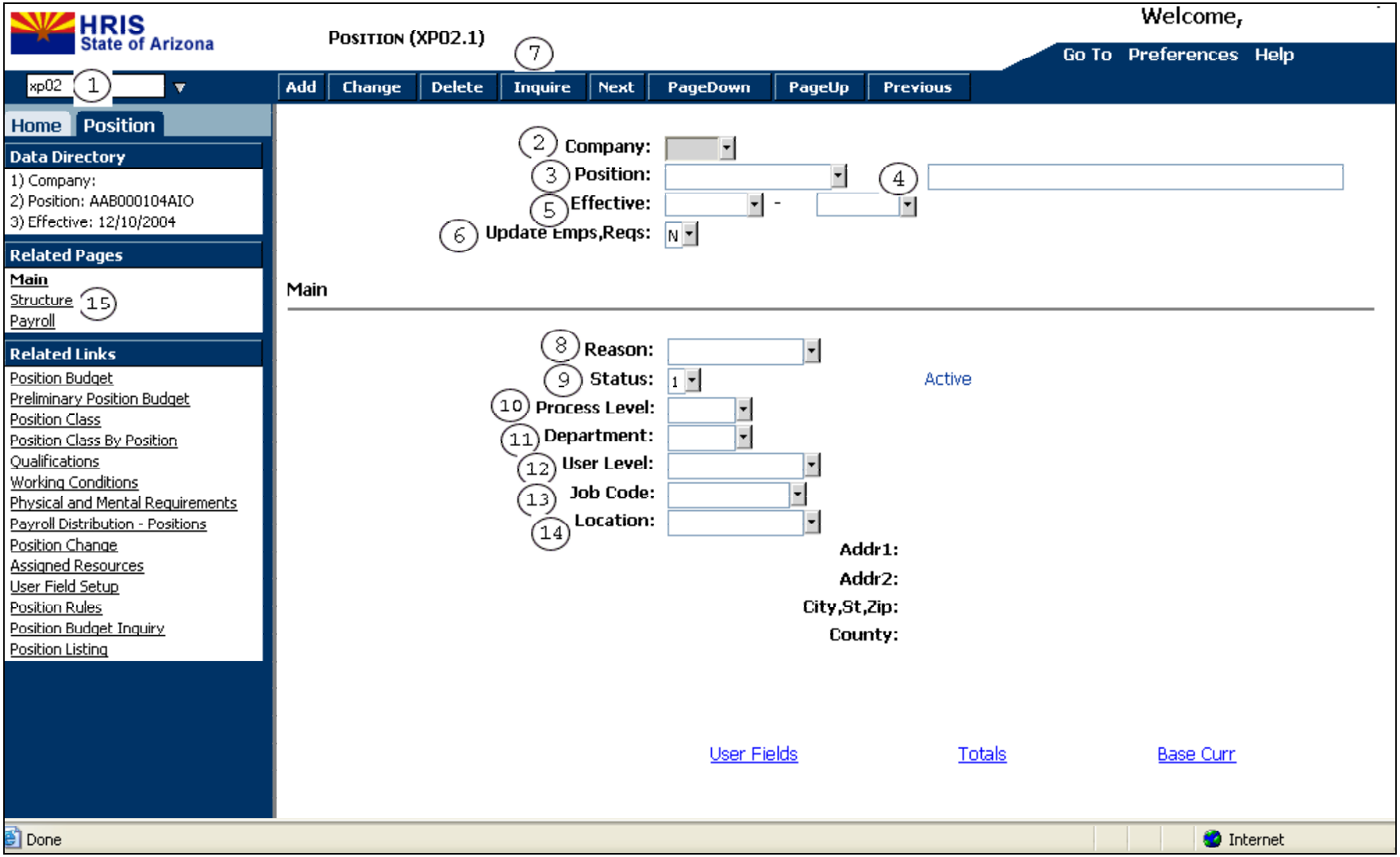
As indicated in the Position Code Basics, there may be many Positions allocated to one Job Code (Job Codes are available in a drop down list on the Position form). Positions with different working titles (e.g., Sr. Groundskeeper, Tucson; Sprinkler System Specialist; Landscape Design Trainee) could all fall in the Job Code of Groundskeeper. Therefore, even if duties and functions, and even descriptions (titles), in the position vary, positions in the same Job Code should have equivalent levels of responsibility, difficulty and accountability. The ADOA Central Class and Compensation Administrators establish Job Codes for all State agencies (agencies do not have access to create Job Codes). But agencies may override other fields, such as expense account fields, which are required on the Position (see the Assigning Multiple Labor Distributions lesson).

Critical Points:

- Only the ADOA Central Class and Compensation Administrator and the Non-System A Agency Class and Compensation Analyst may establish, update and inactivate Position Codes, and change history in the system, using the XP02
- System A agencies use the ZP02 to change several Position fields but cannot modify the Effective Date, Process Level, Schedule and Grade or Job Code
- Positions may be inactivated temporarily (e.g., the Base Position must be inactivated when an Underfill Position is created) or permanently (the FLSA status changes, thus requiring the necessity for another Position Code for the employee; the old Position should not be filled again)
- Positions may be future-dated
- Positions always have an FTE of 1.0
- ADOA Central Class and Compensation Administrator creates Job Codes for all System A and Non-System A agencies
- Job Code information does not default to the Position. However, Position data may default to the employee(s)
- Positions may have working titles which differ from the Job Code and from the titles of other Positions in the same Job Code
- The Position Schedule and Grade should be the same as its Job Code Schedule and Grade
- Employees are not allowed to be placed in Inactive Positions
- Positions with employees in them are not allowed to be Inactivated
- Employee changes, such as a salary increase, impact Position history
- While the Employee's work Location will always show as Payroll, the Position geographic Location information should be kept up to date
- One may drill down on the Position Location Code to find employees in that Location, or to view Location History

Position Form (XP02)

Add Position Code - Main Tab



	HRIS Field	R / O	Step/Action	Expected Results	Notes/ Additional Information
1	White Search Box	R	Type XP02 in the White Search Box. Press Enter on the Keyboard	The Position Form (XP02) will open	There are 3 pages on this form. Begin with the Main tab.
2	**Company** field	R	Type or Select '1'		All forms/actions must contain a 1 in the Company Field
3	**Position** field	R	Enter the new Position Code	The Position Code will fill in, but the white box next to it will be blank. The Position Description (Working Title) should be entered in the blank box	For additional information on position code setup, click Position Code Diagram
4	**Position** field – Second Box (Description)	R	Enter the Working Title of this Position		The Description box next to the Position Code box is not identified but needs to be filled in. You will need to know in advance what the Description (title) will be. Do NOT exceed 30 characters; the only punctuation allowed are a hyphen (-) or a slash (/)
5	**Effective** field – First Box	R	Type the date this Position is to be established		
6	**Update Emp,Reqs** field	O	Do Not change this field – HRIS will default 'N'.	'N' will automatically default into field	
7	**Inquire** Button	R	Click Inquire	"Position Code Does Not Exist" will appear in lower left corner	
8	**Reason** field	O	Type or select from the drop down menu the reason for the entry.		
9	**Status** field	R	Type or select from the drop down menu the status of the position.		Valid Values are: • '1' – Active • '2' – Temporary • '3' – Frozen • '4' – Proposed • '5' – Inactive Default value is '1' if no entry is made.
10	**Process Level** field	R	Type or select from the drop down menu the process level in which the position works.		
11	**Department** field	R	Type or select from the drop down menu the department in which the position works.		
12	**User Level** field	R	Type or select from the drop down menu the check locator code for		

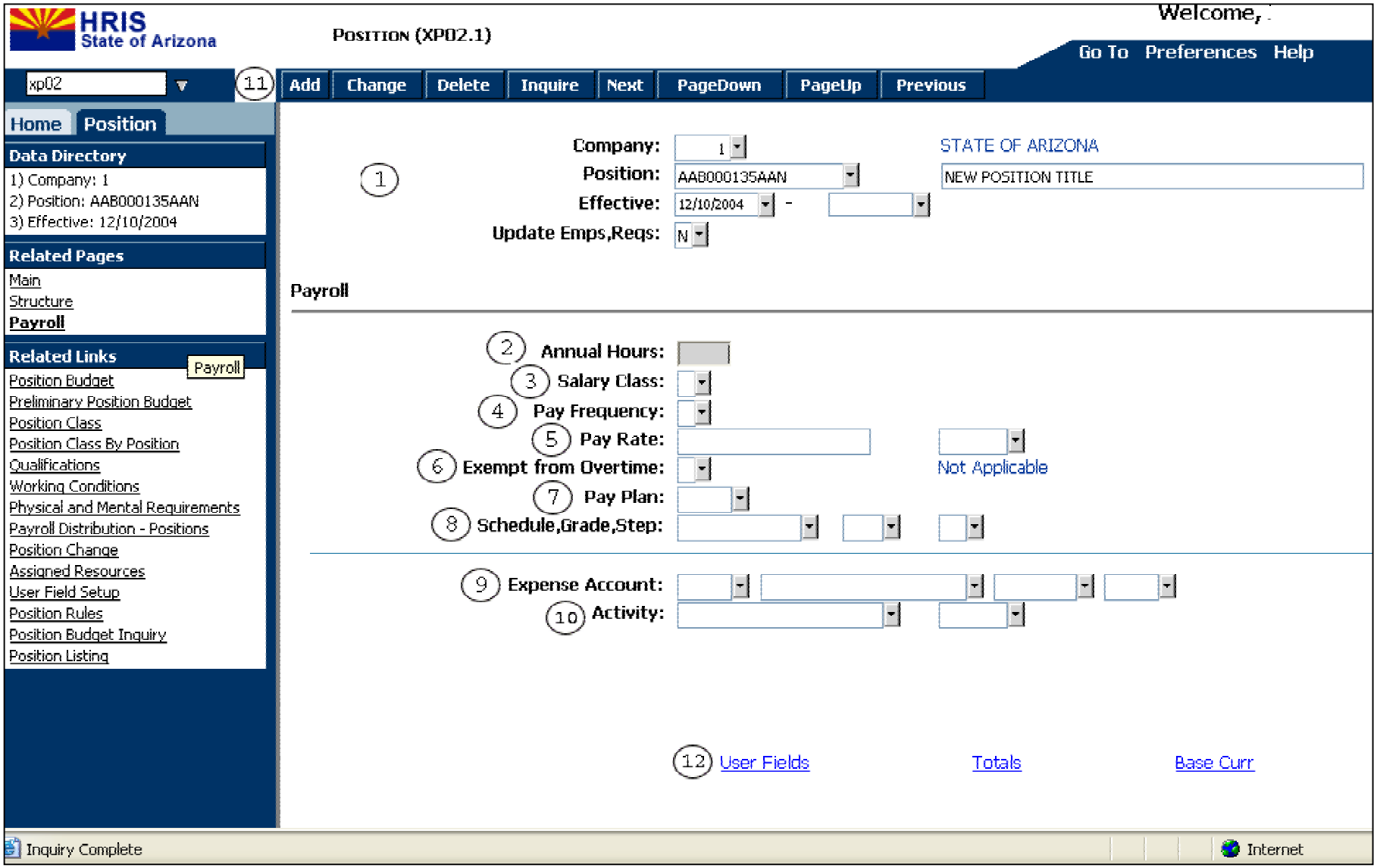
	HRIS Field	R / O	Step/Action	Expected Results	Notes/ Additional Information
			this position.		
13	**Job Code** field	R	Type or select from the drop down menu the job code associated with the position.		A position code can only be allocated to one job code, but a job code can be found on multiple, different position codes.
14	**Location** field	R	Type or select from the drop down menu the true location where this position works.	After the location is selected in the drop down menu, the address will appear in the Address fields on the form.	**Notes** • The information keyed for location on the position will not default to the Employee's record because of implications on the Employee's taxes. Therefore to see the true location of an Employee, you must check the Position.
15	**Structure** field	R	Click on the **Structure** link under Related Pages	The Structure link opens.	

Add Position Code - Structure Tab

	HRIS Field	R / O	Step/Action	Expected Results	Notes/ Additional Information
1	**Company** Field **Position** Field **Effective** Field **Update Emps**, **Reqs** field	R R R R	No Action Required, these fields will default to the information previously entered.		All forms/actions must contain a 1 in the Company Field.
2	**Direct Supervisor** field	R	Type or select from the drop down menu the supervisor code the position reports to.		
3	**Indirect Supervisor** field	N / A	Field is NOT being used by SOA. Leave field BLANK.		Field is NOT being used by SOA.
4	**Link to Supervisor** field	O	Type or select from the drop down menu the supervisor code that corresponds to this position. This field will be blank if the position is not in a supervisory role.		
5	**Work Schedule** field	N / A	Work Schedule will be entered on the Employee. Leave field BLANK.		
6	**Shift** field	N / A	Shift will be entered on the Employee. Leave field BLANK.		
7	**Security Level, Location** field – Box 1	R	Type or select from the drop down menu the Security level for the position. Not all agencies use a security level. If your agency does not use security level, enter '9'. If security levels are being used, enter '1'.		

	HRIS Field	R / O	Step/Action	Expected Results	Notes/ Additional Information
	Security Level, Location field – Box 2	R	Type the security location for the position. Not all agencies use a security location. If you agency does not use a location, enter '9999999999'. If security locations are being used, enter the location.		Field is 10 alpha characters.
8	**Payroll** tab	R	Click on the **Payroll** tab under Related Pages	The Payroll link opens.	

Add Position Code - Payroll Tab



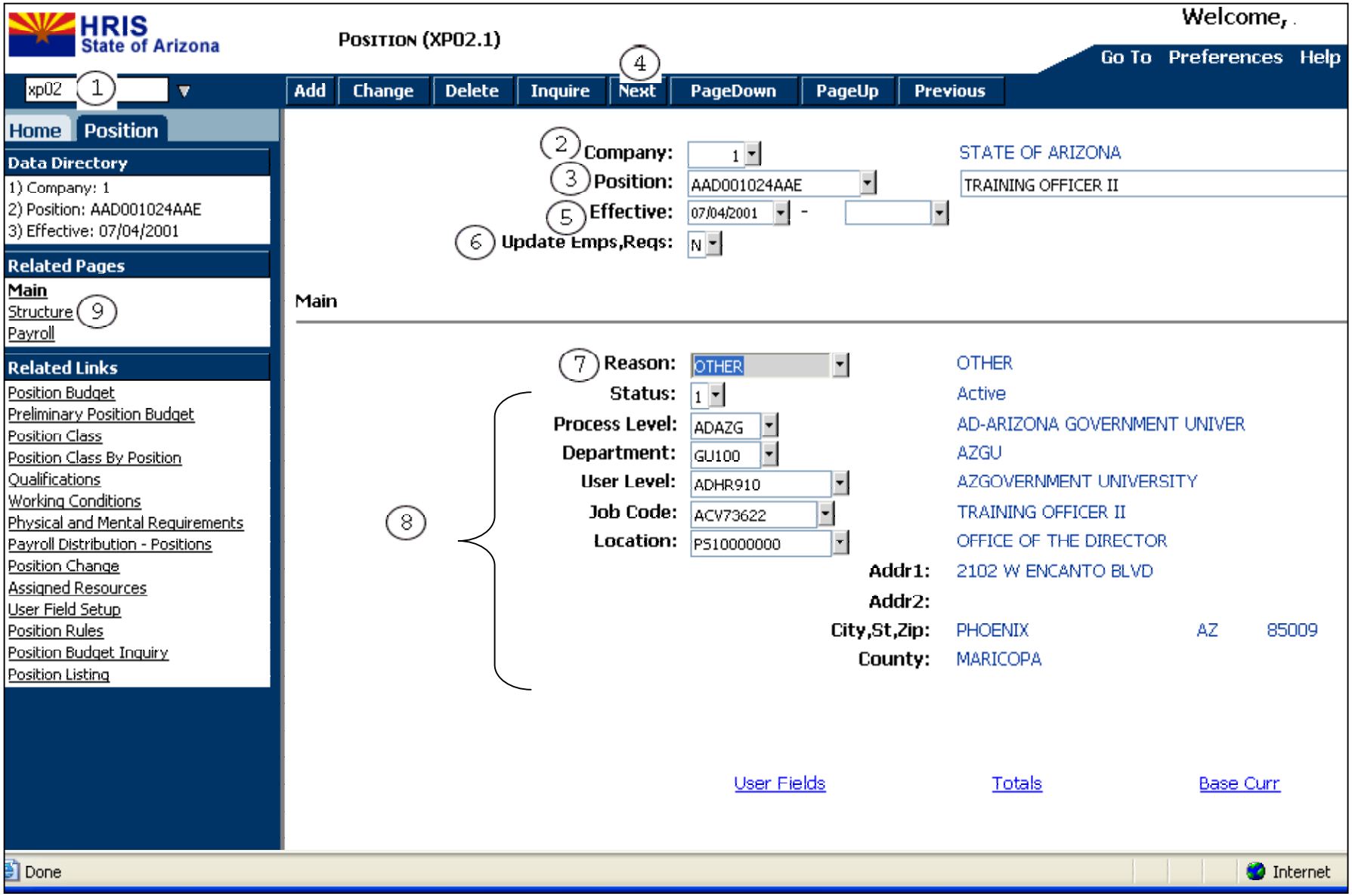
	HRIS Field	R / O	Step/Action	Expected Results	Notes/ Additional Information
1	**Company** Field **Position** Field **Effective** Field **Update Emps**, **Reqs** field	R R R R	No Action Required, these fields will default to the information previously entered.		All forms/actions must contain a 1 in the Company Field.
2	**Annual Hours** field	R	Type the annual hours worked by the position.		Annual hours should be 2080 for all position codes (except Military Affairs Firefighters, which should be 2990).
3	**Salary Class** field	R	Type or select from the drop down menu the salary class for the position.		Valid Values are: • H – Hourly – should be used for all employees except for Elected Officials and Judges • S – Salaried – should be used for ONLY Elected Officials and Judges
4	**Pay Frequency** field	R	Type or select from the drop down menu the pay frequency for the position.		Valid Values are: • 2 – Biweekly – all position codes should be set to biweekly.
5	**Pay Rate** field – Box 1 & 2	N / A	Pay Rate is assigned to the Employee. Pay Rate field should be left BLANK.		
6	**Exempt from Overtime** field	R	Type or select from the drop down menu whether or not the position is exempt from overtime.		Valid Values are: • BLANK – Not Applicable • N – No • Y – Yes
7	**Pay Plan** field	R	Type or select from the drop down menu the pay plan associated with the position.		For non-exempt position codes, select Overtime Plans (NEXP). For exempt position codes, select Payroll Schedules (EXC for positions ending in 'O', and EXP for positions ending in 'E'.
8	**Schedule,Grade, Step** fields – Box 1, 2 & 3	R	Box 1 – Type or select the schedule associated with the job code and, therefore, the position.		Schedule and Grade go hand in hand; one is meaningless without the other. Always think of them together.

	HRIS Field	R / O	Step/Action	Expected Results	Notes/ Additional Information
			Box 2 – Type or select the grade associated with the position. Box 3 – There is no step associated with the position. Leave this field BLANK.		
9	**Expense Account – Box 1** Field	R	Type or select from the drop down menu the Distribution Company.		Box 1 - Distribution Company - GL Company. Field is required.
	Expense Account – Box 2 Field	R	Type or select from the drop down menu the Accounting Unit.		Box 2 – Accounting Unit – field is tied to the GL Company; combination must be applicable or an error message will be received. Field is required.
	Expense Account – Box 3 & 4 Fields	R	Enter an Account and SubAccount number.		Box 3 & 4 – Account should be 6011 and SubAccount should be current fiscal year (FY).
10	**Activity – Box 1** Field	R	Type or select from the drop down menu the Activity number.		Box 1 – Activity - If you are going to use an Account Category, you must input a value in this field.
	Activity – Box 2 Field	O	Type or select from the drop down menu the Account Category.		Box 2 – Account Category – If an Activity is entered; the Account Category field becomes required. For agencies that do not have an Account Category, use the default 'ZZZZZ'. If Acct Unit AFund Attribute is filled in, it must match the GL Company provided. If not, message will appear "AFund Attribute does not match GL Company". • If Acct Unit AFund Attribute is blank, then system checks the Activity AFund Attribute. This Attribute must then match the GL Company. • If Accounting Unit AFund Attribute is blank, then an Activity Code must be provided.
11	**Add** button	R	Click **Add** to add the position to HRIS.	You should receive the message "Add Complete, verify user fields" in the lower left corner.	

	HRIS Field	R / O	Step/Action	Expected Results	Notes/ Additional Information
				When you see this message you must enter the User Fields, as they are not on the new position.	
12	**User Fields** link	R	Click the User Fields link at the bottom of the page.	User Fields page opens.	

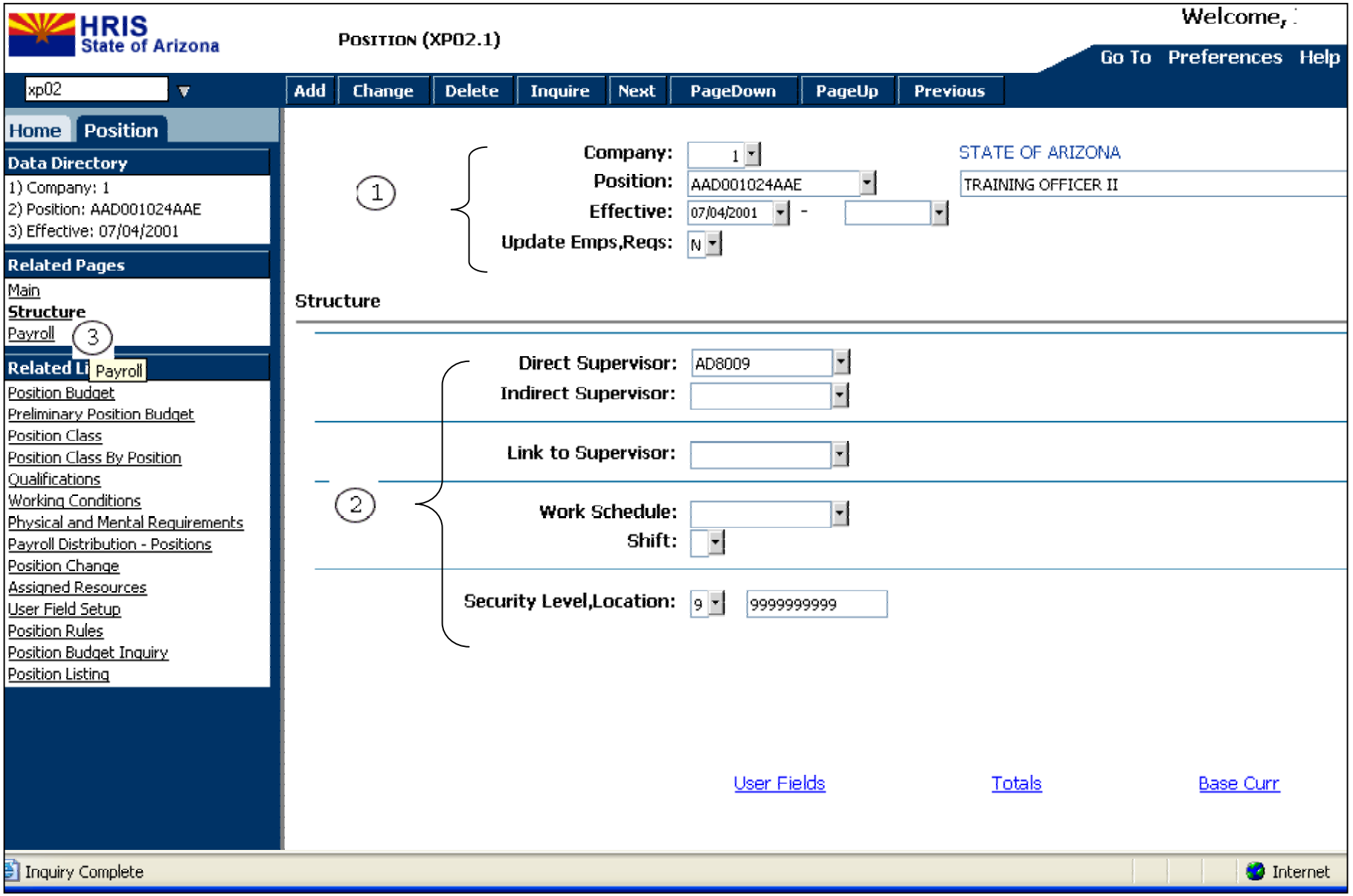
See section User Fields Link (Page 28) for steps required to complete the position transaction. You must complete the steps in this section or the position will not be complete in HRIS.

Update Position Code - Main Tab



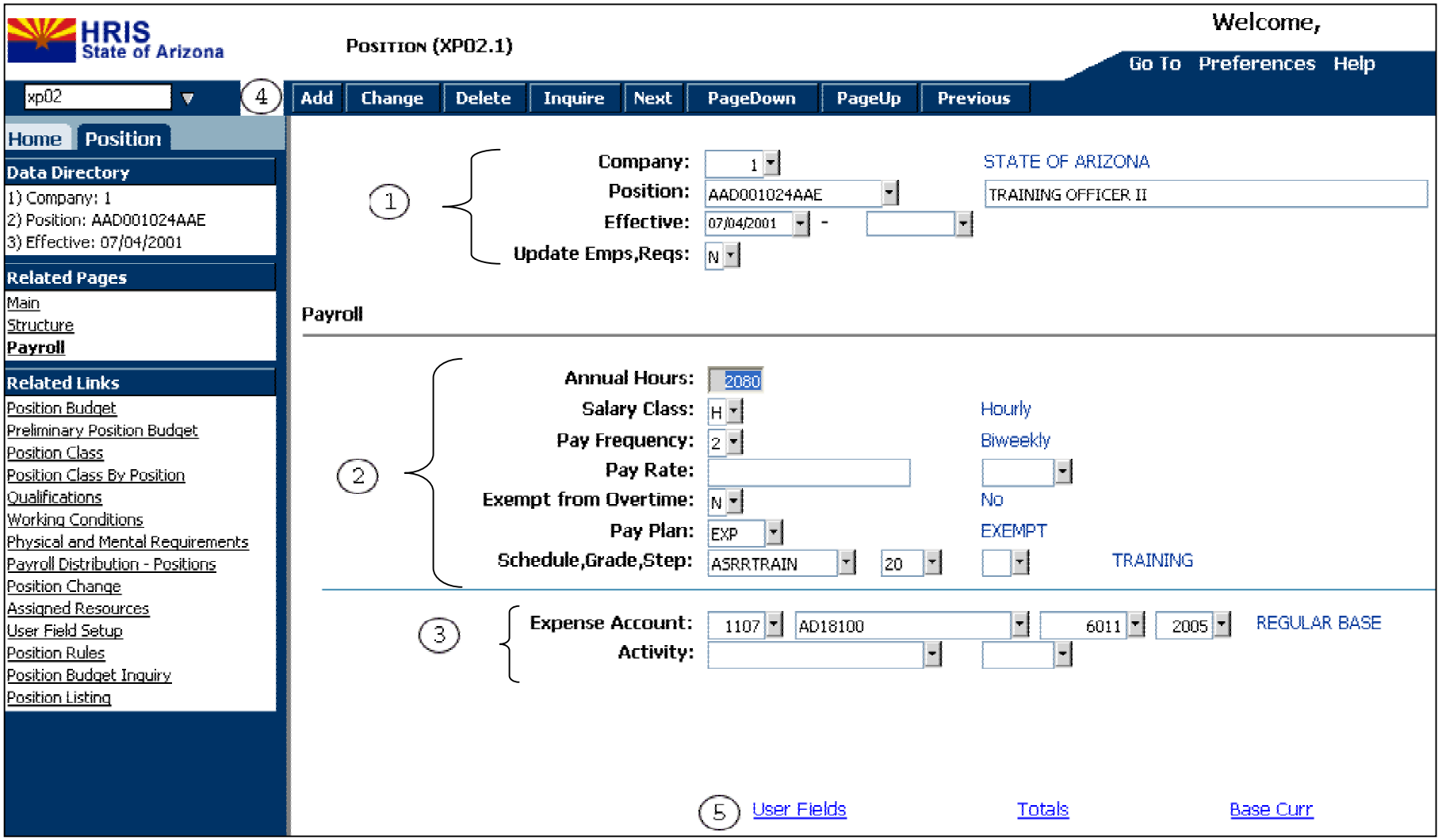
	HRIS Field	R / O	Step/Action	Expected Results	Notes/ Additional Information
1	White Search Box	R	Type XP02 in the White Search Box. Press Enter on the Keyboard	The Position Form (XP02) will open	There are 3 pages on this form. Begin with the Main tab.
2	**Company** field	R	Type or Select '1'		All forms/actions must contain a '1' in the Company Field
3	**Position** field	R	Enter the Position Code	The Position Code will fill in and the title will appear in the box next to the Code.	
4	**Next** button	R	Click **Next** to bring up the position information.	Current position information will appear in the fields.	
5	**Effective** field – First Box	R	Type the NEW Effective date (beginning date) for the position changes		
6	**Update Emp,Reqs** field	O	Do Not change this field – HRIS will default 'N'.	'N' will automatically default into field, and the employee will be updated later.	Action should be pending – NOT immediate.
7	**Reason** field	O	Type or select from the drop down menu the reason for the change.		
8	**Status** field **Process Level** field **Department** field **User Level** field **Job Code** field **Location** field ▪ Code ▪ Code Description ▪ Addr 1 ▪ Addr 2 ▪ City,St,Zip ▪ County	R R R R R R	Type or select from the drop down menu the NEW value for all of the fields that are changing. If fields are not changing, those fields can be left alone.	The Location Code will appear, as well as its description and the address itself. You may drill down on the Code to find employees in that Location, plus Location History.	For Status - Valid Values are: • '1' – Active • '2' – Temporary • '3' – Frozen • '4' – Proposed • '5' – Inactive **Notes** • **For Location - The information keyed for location on the position will <u>not</u> default to the Employee's record because of implications on the Employee's taxes (HR11 Location will be PAYROLL for all employees). Therefore, to see the true location of an Employee, you must check the Position Location.**
9	**Structure** link	R	Click on the **Structure** link under Related Pages.	The Structure link opens.	

Update Position Code - Structure Tab



	HRIS Field	R / O	Step/Action	Expected Results	Notes/ Additional Information
1	**Company** field **Position** field **Effective** field **Update Emps**, **Reqs** field	R R R R	No Action Required, these fields will default to the information previously entered.		All forms/actions must contain a '1' in the Company Field.
2	**Direct Supervisor** field **Indirect Supervisor** field **Link to Supervisor** field **Work Schedule** field **Shift** field **Security Level**, **Location** fields	R N/A O N/A N/A R	Type or select from the drop down menu the NEW value for all of the fields that are changing. If fields are not changing, those fields can be left alone. The following fields **are not** being used by the SOA – Indirect Supervisor, Work Schedule and Shift. Leave these fields BLANK.		Work schedule is on the Employee's record. Shift is on the Employee's record. Not all agencies use a security level & location. If your agency does not use security level, enter all '9's in both fields. If security level, location is being used, enter '1', then the location in box '2'.
3	**Payroll** link	R	Click on the **Payroll** link under Related Pages	The Payroll link opens.	

Update Position Code - Payroll Tab



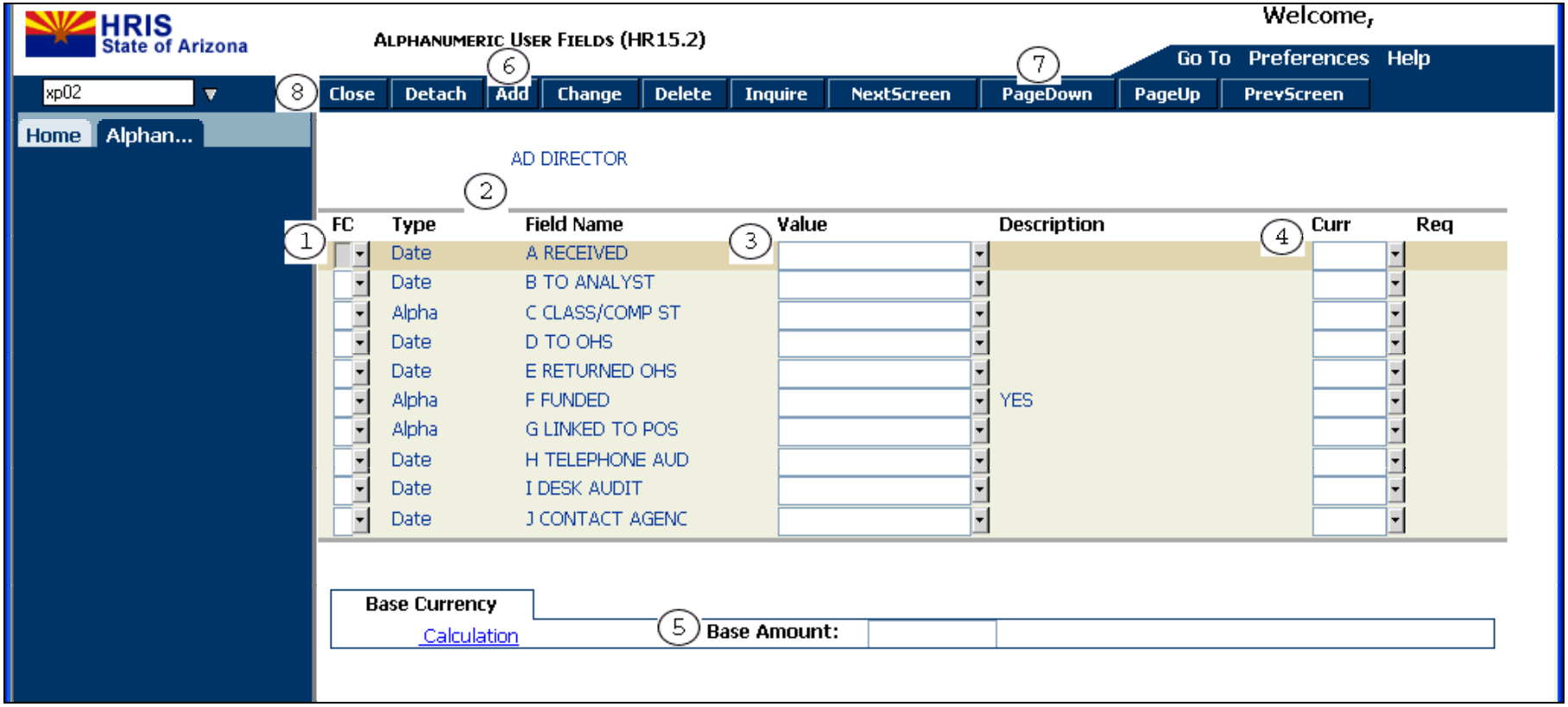
	HRIS Field	R / O	Step/Action	Expected Results	Notes/ Additional Information
1	**Company** field **Position** field **Effective** field **Update Emps**, **Reqs** field	R R R R	No Action Required, these fields will default to the information previously entered.		All forms/actions must contain a 1 in the Company Field.
2	**Annual Hours** field **Salary Class** field **Pay Frequency** field **Pay Rate** field **Exempt from Overtime** field **Pay Plan** field **Schedule,Grade, Step** fields	R R R N/A R R R	Type or select from the drop down menu the NEW value for all of the fields that are changing. The following field is not used by the State of Arizona on Positions: Pay Rate. Leave this field BLANK. If fields are not changing, those fields can be left alone.		Annual hours should be 2080 for all position codes (except Military Affairs Firefighters, which should be 2990). For Salary Class - Valid Values are: • H – Hourly – should be used for all employees except for Elected Officials and Judges • S – Salaried – should be used for ONLY Elected Officials and Judges For Pay Frequency – Valid Values are • 2 – Biweekly – all position codes should be set to biweekly. The **Pay Rate** field is not used by the State of Arizona. Rate is assigned to the employee. For Exempt from Overtime – Valid Values are: • BLANK – Not Applicable • N – No • Y – Yes For Pay Plans – • For non-exempt position codes, select Overtime Plans. • For exempt position codes, select Payroll Schedules. For Step – This only pertains to Employees

	HRIS Field	R / O	Step/Action	Expected Results	Notes/ Additional Information
					on a Step and Grade Schedule.
3	**Expense Account** fields **Activity** fields	R R	Type or select from the drop down menu the NEW value for all of the fields that are changing. If fields are not changing, those fields can be left alone.		Expense Account - Box 1 - Distribution Company - GL Company. Field is required. Expense Account - Box 2 – Accounting Unit – field is tied to the GL Company, combination must be applicable or an error message will be received. Field is required. Expense Account - Box 3 & 4 – Account should be 6011 and SubAccount should be the current fiscal year (FY) Activity - Box 1 - If you are going to use an Account Category, you must input a value in this field. Activity – Box 2 – Account Category – If an Activity is entered then the Account Category field becomes required. For agencies that do not have an Account Category, use the default 'ZZZZZ'. If Acct Unit AFund Attribute is filled in, it must match the GL Company provided. If not, message will appear "AFund Attribute does not match GL Company". • If Acct Unit AFund Attribute is blank, then system checks the Activity AFund Attribute. This Attribute must then match the GL Company. • If Accounting Unit AFund Attribute is blank, then an Activity

	HRIS Field	R / O	Step/Action	Expected Results	Notes/ Additional Information
					Code must be provided.
4	**Add** button	R	Click **Add** to save the modified position in HRIS.	You should receive the message "Add Complete, verify user fields" in the lower left corner. When you see this message you must enter the User Fields, as they are not yet on the new position.	
5	**User Fields** link	R	Click the User Fields link at the bottom of the page.	User Fields page opens.	

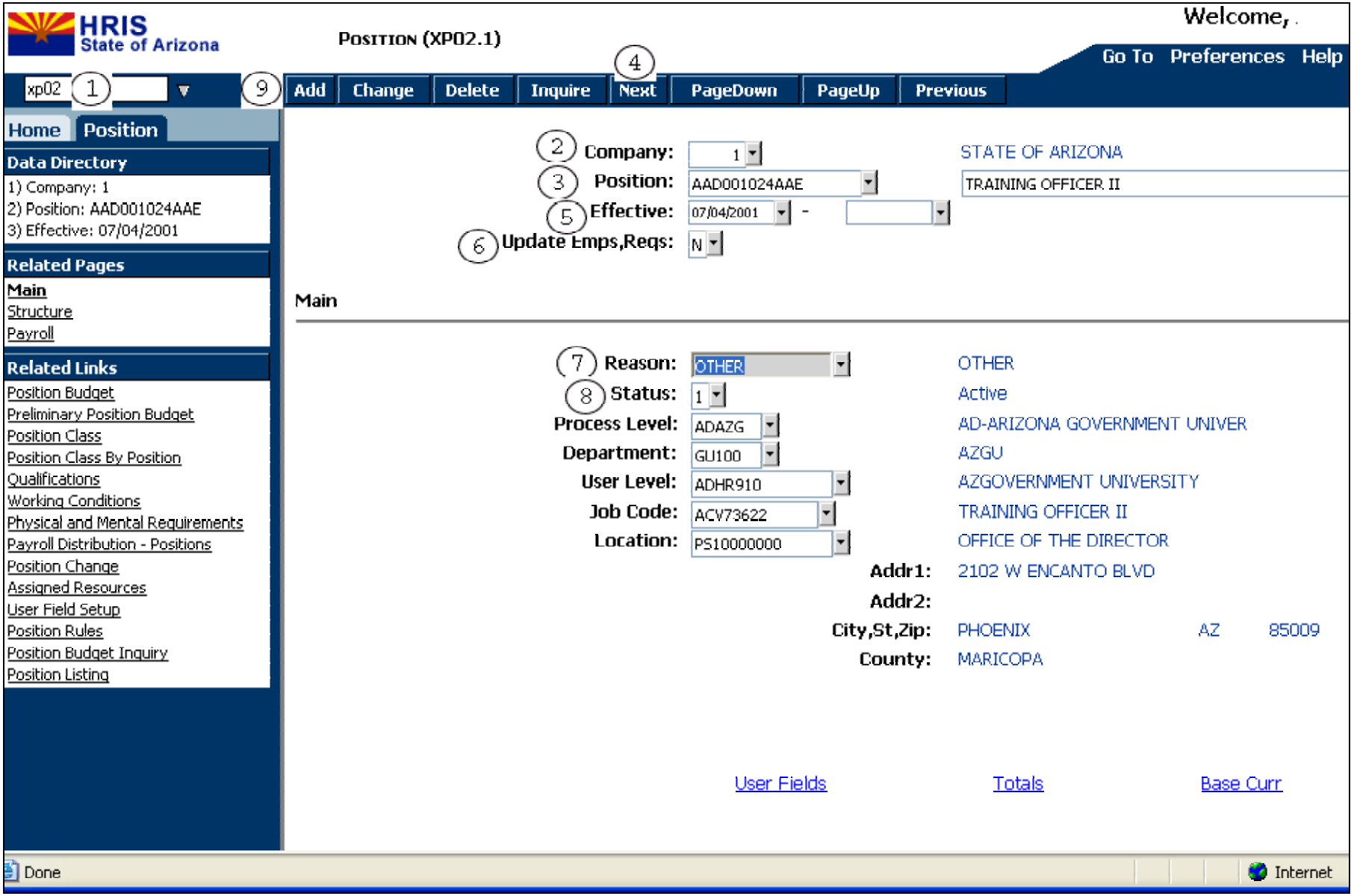
See section User Fields Link (Page 28) for steps required to complete the position transaction. You must complete the steps in this section or the position will not be complete in HRIS.

User Fields Link



	HRIS Field	R / O	Step/Action	Expected Results	Notes/ Additional Information
1	**FC** field	R	Type 'A' or select 'Add' from the drop down menu next to the user field row you would like to Add.		To see additional user fields that can be added, click PageDown on the menu bar.
2	**Type and Field Name** field	O	Fields display the name of the various user fields. The **only** fields that should be used are F Funded; G Linked to Pos; W Uncovered Reason; and X B5 or Lmtd End Date		
3	**Value** field	R	Type or select from the drop down menu the value to add to the user field. Values may not always be available using the drop down menu, in which case you would enter your own values		
4	**Curr** field	N / A	Field is not being used by the State of Arizona. Leave BLANK.		
5	**Base Amount** field	N / A	Field is not being used by the State of Arizona. Leave BLANK.		
6	**Add** button	R	Click **Add** to save the changes on the current page.		
7	**PageDown** button	O	Click **PageDown** to access additional user fields.		
Repeat Steps 1 (Page 29) to step 7 (Page 29) for all user fields being added on the specified page**. DO NOT CLICK PageDown without clicking Add or you will lose your changes.** After all user fields have been added, continue with the final step.					
8	**Close** button	R	Click **Close** to return to XP02.	The XP02 form opens.	**The position code should appear in alphanumeric order within the process level and department.**

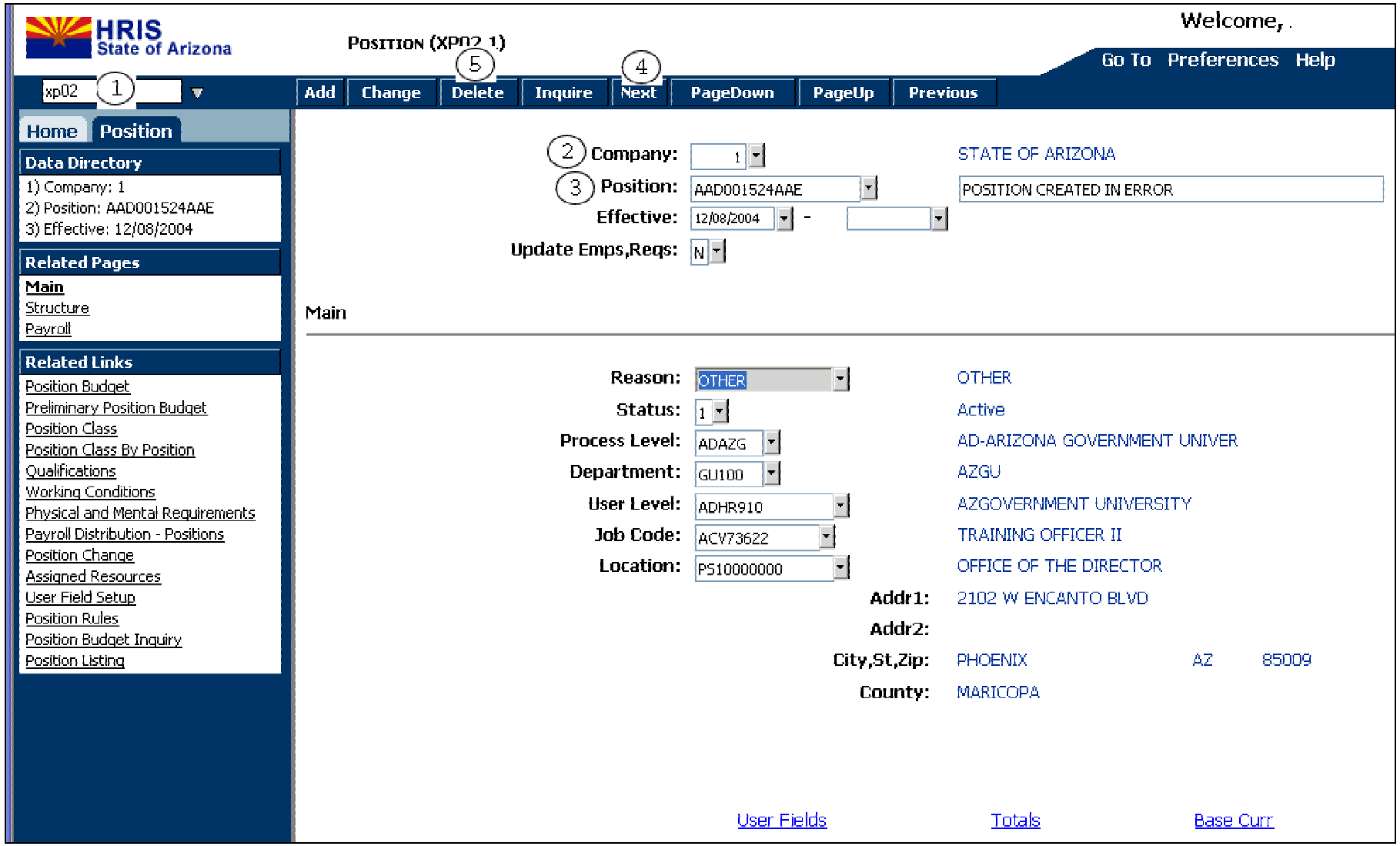
Inactive Position Code - Main Tab



	HRIS Field	R / O	Step/Action	Expected Results	Notes/ Additional Information
1	White Search Box	R	Type XP02 in the White Search Box. Press Enter on the Keyboard	The Position Form (XP02) will open	There are 3 pages on this form. Begin with the Main tab.
2	**Company** field	R	Type or Select '1'		All forms/actions must contain a '1' in the Company Field
3	**Position** field	R	Enter the Position Code of the position to be inactivated.	The Position Code will fill in and the title will appear.	
4	**Next** button	R	Click **Next** to bring up the position information.		Current position information will appear in the fields.
5	**Effective** field – First Box	R	Type the NEW Effective date (beginning date) for the position changes (date position is becoming inactive)		**Notes** • **Do Not** enter a date in the box next to the Effective field **(End Date)** on the original position code. This will delete all history from the position. By adding a new beginning effective date for the inactive position code, HRIS is able to preserve history for the position code.
6	**Update Emp,Reqs** field	O	Do Not change this field – HRIS will default 'N'.	'N' will automatically default into field	
7	**Reason** field	O	Type or select from the drop down menu the reason for inactivating the position.		
8	**Status** field	R	Type '5' or select Inactive from the drop down menu.		
9	**Add** button	R	Click **Add** to save the inactive position in HRIS.	You should receive the message "Add Complete, verify user fields" in the lower left corner.	This step automatically places an End Date on the position and creates a current record with no end date. **NEVER** put an "End Date" on the original position code and click Change, this will delete all the history from the position code. Delete should only be used to correct an error if history has not been built.

	HRIS Field	R / O	Step/Action	Expected Results	Notes/ Additional Information
3	**Position** field	R	Click the drop down arrow at the end of the Position field.	The inactivated position code should appear in alphanumeric order within the process level and department with an end date and a status of Inactive.	For history on the position code, you must scroll down to find the inactivated position code and drill down on the Position Code within the form (cannot be found in the Search/Find mode).

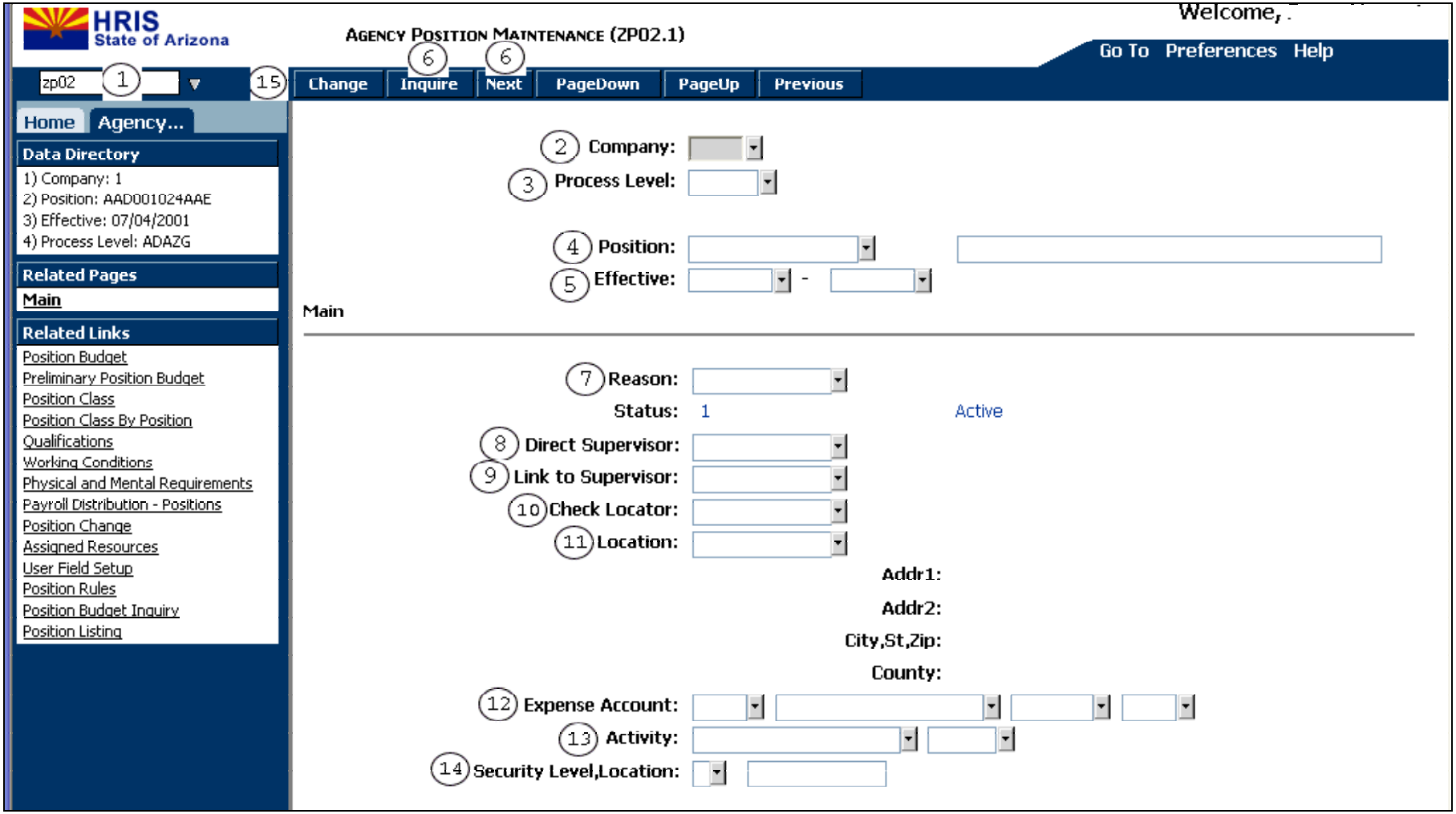
Delete Position Code - Main Tab – POSITION CANNOT HAVE HISTORY



	HRIS Field	R / O	Step/Action	Expected Results	Notes/ Additional Information
1	White Search Box	R	Type XP02 in the White Search Box. Press Enter on the Keyboard	The Position Form (XP02) will open	There are 3 pages on this form. Begin with the Main tab.
2	**Company** field	R	Type or Select '1'		All forms/actions must contain a '1' in the Company Field
3	**Position** field	R	Enter the Position Code of the position to be deleted.	The Position Code will fill in and the title will appear.	
4	**Next** button	R	Click **Next** to bring up the position information.		Current position information will appear in the fields.
5	**Delete** button	R	Click **Delete** to remove the position from HRIS.	You should receive the message "– Press OK to process" in a separate box. When you click OK, a message in the lower left corner will read, "Records Have Been Deleted."	**Notes** • Entry of this Delete feature will delete all the history associated with the position code. Deletes should only be used to correct an error if history has not been built on the position. Drill around on the position to ensure no history exists.

Agency Position Form (ZP02)

Update Position Fields – Main tab



	HRIS Field	R / O	Step/Action	Expected Results	Notes/ Additional Information
1	White Search Box	R	Type XP02 in the White Search Box. Press Enter on the Keyboard	The Position Form (XP02) will open	There are 3 pages on this form. Begin with the Main tab.
2	**Company** field	R	Type or Select '1'		All forms/actions must contain a 1 in the Company Field
3	**Process Level** field	R	Type or select from the drop down menu the Process level where the position is assigned.		Process Level must be entered first in order to bring up Position information.
4	**Position** field	R	Type or select from the drop down menu the Position Code	The Position Code will fill in and the position title will appear.	For additional information on position code setup, click Position Code Diagram If using the drop down menu, you will see all position codes displayed, but you will only be able to select, view and change the position codes associated with the Process Level from step 3. In addition, you will only see the positions in which your security is allowed.
5	**Effective** field – First Box	N / A	This field cannot be changed on the ZP02.		Because the effective date of the Position remains the same, any field changes will appear as if they occurred on the original effective date.
6	**Inquire** or **Next** Buttons	R	Click Inquire if the effective date is populated. Click Next if the effective date is unknown – this will bring up the most recent record.	"Inquiry complete" will appear in the lower left corner.	If you select a position code that does not match the process level, you will see the message "Record does not exist" in the lower left corner when you click **Next** or **Inquire**.
7	**Reason** field	O	Type or select from the drop down menu the reason for the change.		**Status** field cannot be changed. Display only.
8	**Direct Supervisor** field	R	Type or select from the drop down menu the updated supervisor code the position reports to. If field is not changing, skip this step.		
9	**Indirect Supervisor** field	N /	Field is NOT being used by SOA.		

	HRIS Field	R / O	Step/Action	Expected Results	Notes/ Additional Information
		A	Leave field BLANK.		
10	**Check Locator** field	R	Field equates to user level. Type or select from the drop down menu the updated check locator code for this position. If field is not changing, skip this step.		
11	**Location** field	R	Type or select from the drop down menu the updated NEW location of where this position works. If field is not changing, skip this step.	After the location is selected in the drop down menu, the address will appear in the Address fields on the form.	**Notes** • The information keyed for location on the position will <u>not</u> default to the Employee's record because of implications on the Employee's taxes **(HR11 Location will be PAYROLL for all employees)**. Therefore to see the true location of an Employee, you must check the Position Location.
12	**Expense Account – Box 1** Field	R	Type or select from the drop down menu the Distribution Company.		Box 1 - Distribution Company - GL Company. Field is required.
	Expense Account – Box 2 Field	R	Type or select from the drop down menu the Accounting Unit.		Box 2 – Accounting Unit – field is tied to the GL Company, combination must be applicable or an error message will be received. Field is required.
	Expense Account – Box 3 & 4 Fields	R	Enter an account or sub account number		Box 3 & 4 – Account should be 6011 and SubAccount should be the current fiscal year (FY).
13	**Activity – Box 1** Field	R	Type or select from the drop down menu the Activity number.		Box 1 – Activity - If you are going to use an Account Category, you must input a value in this field.

	HRIS Field	R / O	Step/Action	Expected Results	Notes/ Additional Information
	Activity – Box 2 Field	O	Type or select from the drop down menu the Account Category.		Box 2 – Account Category – If an Activity is entered then the Account Category field becomes required. For agencies that do not have an Account Category, use the default 'ZZZZZ'. If Acct Unit AFund Attribute is filled in, it must match the GL Company provided. If not, message will appear "AFund Attribute does not match GL Company". • If Acct Unit AFund Attribute is blank, then system checks the Activity AFund Attribute. This Attribute must then match the GL Company. • If Accounting Unit AFund Attribute is blank, then an Activity Code must be provided.
14	**Security Level, Location** field – Box 1	R	Type or select from the drop down menu the Security level for the position. Not all agencies use a security level. If your agency does not use security level, enter '9'. If security levels are being used, enter '1'.		
	Security Level, Location field – Box 2	R	Type the security location for the position. Not all agencies use a security location. If you agency does not use a location, enter '9999999999'. If security locations are being used, enter the location.		Field is 10 alpha characters.
15	**Change** button	R	Click **Change** to save the updates to the position.	See 'Change Complete – Continue' in the lower left corner.	